



Creating Events

OVERVIEW

The goal of this task is to create an event in Sourcing Director, using an event creation wizard that makes the process of creating and setting up an event easy and efficient.

The wizard guides users through a logical order of the following event elements: Setup, Users, Description, Prerequisites, Buyer Attachments, Questions, Items, Vendors, and a final Review and Submit page. This ensures key elements of the event are not missed or forgotten.

If you have questions, contact the State Procurement Bureau for more information.

CREATING A NEW EVENT

1. Navigate to **Sourcing > Solicitations > Create New Event**.
2. In the **Create Solicitation** pop-up window that appears:
 - Enter an **Event Title**.
 - The **Project** field should pre-populate with your agency name.
 - Click **Next**.
 - Choose an **Event Type**: *Request for Information, Request for Proposal, Invitation for Bid, Request for Qualifications, Limited Solicitation or Sole Source* may be selected, or search for an event type by clicking the search icon or simply typing it in the field.
 - Once the event type is selected, a template matching that type will pre-populate the **Create from Template** field.
 - Click **Create Solicitation**.
3. Once the event has been created, the **Setup** page will display. Use the event creation wizard on the left-hand side of the page to navigate through each step of the event configuration.
 - At the bottom of each page, click **Next** to advance through the event wizard, after each element is configured.
 - Or, click **Save Progress** if you need to continue your event configuration process at a later time.
 - Each completed task of the wizard is marked with a green checkmark, to indicate progress while creating an event.
 - Please note: all options with an asterisk (*) are required for you to configure.

CONFIGURING: SETUP

1. Optionally rename the **Event Title** or change the **Event Number**.
2. Select a **Reporting Commodity Code** by clicking the **Edit** button. (**Additional Commodity Codes** may be selected, as well.)

3. Select **Force Vendor Invitations by Commodity Code** to add vendors to your event whose commodity code(s) match an commodity codes selected for the event. These vendors will receive event notifications.
4. In the **Payment** section:
 - Enter an **Estimated Value**, which is the total contract value of the event.
 - This is for internal use only: vendors will not be able to see this value.
 - Designate the **Payment Terms** using the drop-down menu.
5. Set more advanced features in the **Bid and Evaluation** section: click **Yes** to use sophisticated evaluation tools such as **Panel Questionnaire, Auto Score, and Cost Analysis**. Contact the State Procurement Bureau to learn more about these settings.
6. Under **Display and Communication**, click **Yes** to display the event on the State of Montana's public bid site. If you select **No**, the event will remain hidden from the public. This option cannot be changed once the event has been published.
7. Decide on the **Event Date** times:
 - The **Release Date** is optional but determines if vendors can see the event before they can place bids.
 - The **Open Date** and **Close Date** determine the day and time that vendors are able to place bids.
8. Click **Next**.

CONFIGURING: USERS

As an Event Owner, the user can assign various event-level permissions for others associated with the event on the **Users** page.

1. Click **Add Users** to assign other users as **Event Owners, event Contacts, or Stakeholders**.
2. User permissions are also defined by the **Project**, which is why some users may already be listed on the page.
3. Click **Next**.

CONFIGURING: DESCRIPTION

A description may be added, to provide a brief summary of the event, to help vendors determine whether or not to participate in the event.

1. Type a description from scratch in the space provided, or...
2. Click **Copy from Library** to search for and select an existing available description, and edit as needed.
3. Click **Next**.



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CONFIGURING: PREREQUISITES

Prerequisites can be added to the event, for vendors to complete before being permitted to bid or even view the event.

1. Click **Add Prerequisite**.
2. Select **Add New Prerequisite** to add a new prerequisite from scratch, or...
3. Select **Add from Library** to search for and select an existing available prerequisite.
4. A prerequisite can be deleted from its **Actions** drop-down menu.
5. Click **Next**.

CONFIGURING: BUYER ATTACHMENTS

Attachments may be added to the event, for vendors to download, in an effort to help the vendor provide better quotes or proposals.

1. Click **Add Attachment**.
2. Select **Add New Attachment** to add a new document, or...
3. Select **Add from Library** to search for and select an existing available attachment.
4. Click **Next**.

CONFIGURING: QUESTIONS

Questions may be added to the event if additional information is needed from the vendor above the pricing for the goods and/or events of the event. For more details, view the *Adding Questions and Items* video.

1. Click **Add Question** to add a new question from scratch, or...
2. Click **Add or Import**:
 - Select **Add from Library** to search for and select an existing available question.
 - Select **Import from File** to import an Excel file of questions.
3. Questions may be organized into groups and or pages of questions, as well.
4. Click **Next**.

CONFIGURING: ITEMS

Items are the goods and/or services that are being sourced with the event. For more details, view the *Adding Questions and Items* video.

1. There are two tabs to organize **Items**: **Product Line Items**, and **Service Line Items**. Use each tab as appropriate to add products and services as items to the event; the functions of each tab are the same.

2. Click **Add Product Line Item** to add a new item from scratch, or...
3. Click **Add or Import**:
 - Select **Add from Library** to search for and select an existing available item.
 - Select **Import from File** to import an Excel file of items.
4. Repeat as necessary on each tab.
5. Click **Next**.

CONFIGURING: VENDORS

There are several options when it comes to adding **Vendors** to participate in the event.

1. If the vendor is already registered:
 - Click the **Add Vendors to Event** tab.
 - Search by **Vendor** name, **Vendor Contact** name, location, or **Commodity Code** to find the registered vendors to add to the event.
2. If the vendor cannot be found in the search, they are unregistered and can be added manually to the event:
 - Click **Manually Invite Vendors**.
 - Click **Add Vendor to Event** to enter information about one vendor.
 - Click **Import** to import an Excel file of vendor information.
3. Click **Next**.

LAST STEP: REVIEW AND SUBMIT

The final configuration step is to **Review and Submit** the event for approval.

1. Configuration options that are completed are listed as green in the **Progress** column.
2. Configuration options that are incomplete will include links to return back to their respective sections in the **Action Needed** column. Complete the necessary information and return to the **Review and Submit** page.
3. Once all required event configurations are completed, click **Submit for Approval** to send the event into approval workflow. Once the event is approved, it will become live for vendors.